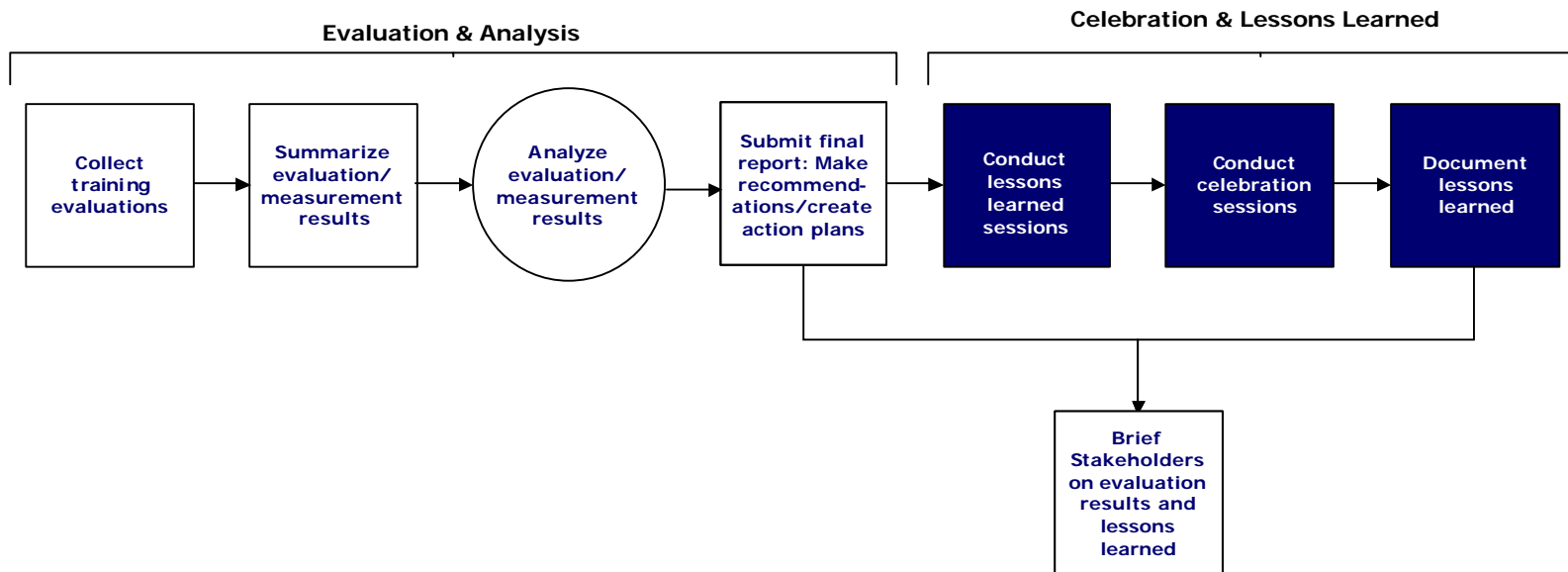


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Assess Phase Flow Chart





Assess Phase Overview

This overview lists the Assess phase inputs and outcomes necessary to develop training that is relevant, interactive, engaging, polished, and supported. Refer to the overall process checklist for additional context.

Inputs

What are the necessary inputs to complete this phase?

- ☐ Completed training sessions
- ☐ Participant course evaluations
- ☐ Trainer evaluations

Description/Explanation

What are the components of the Assess phase?

- In the Deliver phase, as training courses are completed, trainers submitted training evaluations to FSAU. These evaluations offer the data necessary to assess the value of the course.
- Trainer and participant course evaluations are summarized. The results of this summary are analyzed to measure the effectiveness of the content, presentation, and other factors.
- From this analysis, a final report is created that offers recommendations for future programs.
- Trainers, development team members, and logistics coordinators gather to celebrate the course. In this session, contributions are acknowledged, successes noted, and lessons learned documented for future teams.

Outcomes

What are the outcomes of this phase?

- ☐ Final evaluation report, including a summary of findings, analysis of results, and recommendations for future training programs
- ☐ Celebration session, including debrief of course evaluation findings
- ☐ Document of lessons learned
- ☐ Stakeholders briefed on evaluation results and lessons learned
- ☐ Cost data provided to cost analysis team



Collect, Analyze, and Summarize Evaluation Results

Overview

In this phase of the training process, collect, analyze, and summarize the evaluation results. Participants and trainers completed evaluations during the Delivery phase of training. The evaluations measure the success of the course and the analysis of the findings enable the team to make recommendations for future sessions. A final report is produced at the end of this phase to summarize the data and provide recommendations to future teams.

Collection

Collect all evaluations before analyzing results. For data that is collected and submitted to a central point of contact, ensure that all evaluations are gathered for each session. (A checklist of sessions and who is responsible for submitting the evaluations is often helpful.) If the information is to be processed by the session instructor, ensure that the instructor understands the processing methodology and format. Make sure that all evaluations are archived for future review.

If the evaluation approach requires data collection from outside sources (supervisory evaluations of employee performance, computer reports on data accuracy/error frequency, etc.), ensure that this information has been collected and is ready for analysis. Obtaining data from outside sources may require significant lead-time and/or specialized data preparation.

Analysis of data

The analysis process depends on the types of data collected, which are generally numerically scaled or free form comments. The evaluation instrument may also collect both types of data, which will affect the analysis approach.

If the evaluation instrument collected strictly numeric data, a spreadsheet automates the analysis process. Numeric scores can be analyzed at many levels:

- Average scores (total of all scores divided by number of submissions): Basic score for a measure, can be distorted by scores at opposite ends of scale
- Trend analysis: Identifies trends in the scores provided (e.g., self-identified inexperienced participants scored the course learning activities higher than those with more experience), can be used to track group scores
- Statistical analysis: Measures the impact of one score against other scores, useful for predicting how groups of participants will react to similar training sessions

The numeric information collected is analyzed by averaging the scores. Trend and statistical analysis provide important information about how particular groups perceived the course and are useful for planning future courses. Statistical analysis requires a significant investment of time and effort to ensure that conclusions are supported by data. This may require that several years' worth of data be analyzed so that true conclusions about the participants training can be made.

Reporting results of data analysis

Summarize the results of numeric scores, including a short description of the items measured, how it was collected, source, and the methodology. Include a general statement of what is implied by the results. If the data has been examined for trends, briefly report the trends implied by the data. All scores should be included either in the body of the report or as an appendix.



Summaries based on participant comments should include a general statement regarding the strengths and weaknesses of the sessions as noted by the participants. Specific comments that illustrate strengths and weaknesses should be selected and included in the summary. A complete listing of all the comments collected should be included in an appendix.

If using a blend of numeric and commentary data, incorporate both methods discussed above.

Conduct Celebration and Document Lessons Learned

Upon completion of a major project, an important step is to celebrate its successes and document its lessons learned. Conducting a celebration and lessons learned gathering recognizes employees for their work while collecting their input. The lessons learned component captures key elements of the design, development, logistics, and delivery process for future teams. It encourages recognition for employee work, expresses gratitude for tasks achieved, and validates the successes of a collaborative effort.

Celebration

A celebration provides a positive atmosphere to acknowledge contributions and recognize successes of a project. It includes the following elements:

- Recap effort involved
- Discuss accomplishments
- Review evaluation results
- Share stories of the experience
- Express thanks and appreciation for contributions

Lessons Learned

This section assesses the development effort and documents suggestions to benefit future teams, noting both accomplishments and areas for development. It asks those involved in the design, development, logistics, and delivery of a program for their feedback. Since team members need their views to be validated, it's helpful to acknowledge that some proposed changes might occur in the short term, while others may affect long term planning. Any applicable and feasible recommendations should be implemented both to strengthen future programs and ensure those involved that their views have been heard.

It is preferable to ask a neutral facilitator to conduct the lessons learned session so all participants feel free to speak openly and honestly. Different approaches can be used to gather lessons learned information from team members, such as writing ideas on a template to share with others, make notes on an index card to be read by the facilitator (maintaining anonymity), or through a group discussion. Whatever approach is used, the goal is to provide a comfortable environment in which team members can propose suggestions for future teams.

Each documented lesson should meet the following three criteria:

- Repeatable and general, so it can be incorporated into the planning process for future course development
 - Derive from experiences gained during the current project, rather than a collection of experiences from past projects
 - Prescriptive and as detailed as possible to provide context for future teams

A lessons learned discussion encourages reflection. Reflection is part of continuous improvement, increasing accountability, and providing context around experiences. Lessons learned sessions provide a safe environment for this kind of reflection and a vehicle for its implementation. It also develops memories about observations and lessons, thereby enhancing learning experiences and enabling personal and professional growth.

* Refer to **Sample** appendix for celebration and lessons learned session agendas.

